May 24, 2011

TO: Teresa Parsons, SPHR
Director's Review Program Supervisor

FROM: Kris Brophy, SPHR
Director's Review Program Investigator

SUBJECT: Mark Story v. Eastern Washington University
Allocation Review Request ALLO-10-055

Director's Determination

This position review was based on the work performed for the six-month period prior to June 2, 2010, the date Eastern Washington University Human Resources Office (EWU-HR) received Mark Story's request for a position review. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of his assigned duties and responsibilities, I conclude his position should be reallocated to the Information Technology Specialist 3 (ITS 3) classification.

Background

On June 2, 2010, EWU-HR received a Position Questionnaire (PQ) from Mr. Story requesting reallocation of his position to the Information Technology Specialist 3 (ITS 3) classification. Both he and his manager signed the PQ. On September 15, 2010, EWU issued its allocation decision, concluding Mr. Story's position was properly allocated to the ITS 2 class (Exhibit B-1).

By fax on October 4, 2010, the Department of Personnel received Mr. Story's request for a Director's review of EWU's allocation determination (Exhibit A-1).

On March 17, 2011, I conducted a Director's review telephone conference with Mr. Story, Ms. Electra Jubon, Council Representative, WFSE; and Lori Kory, Human Resource Associate, EWU.

Mr. Story submitted additional information following the review telephone conference. A final response from EWU-HR was received on March 18, 2011. This information has been added to the record and incorporated as exhibits to the file.

Rationale for Director's Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Duties and Responsibilities

Mr. Story provides information technology specialist support to the College of Social & Behavioral Sciences (CSBS) and the College of Arts and Letters (CAL). The focus of Mr. Story's position is to maintain four student computer labs, which includes three CSBS labs and one Art lab. Mr. Story provides technical support to the Colleges by maintaining the hardware, software, peripherals, servers and connectivity of the equipment used in the labs. In addition, he provides administrative support to the operation of the three CSBS labs. In addition to his primary function, Mr. Story assists with development, maintenance and support of multiple web micro-sites for the Colleges. He also assists with video-recording and post-production for special events and providing individual users associated with the Colleges departmental staff. He also provides network back-up.

Ms. Story reports to Mr. Jeff Stafford, Associate Dean, CSBS. Mr. Story completed a Position Questionnaire Form (Exhibit B-2) and submitted a supplemental response (Exhibit B-3), and a follow-up email to Ms. Kory to document his assigned duties and responsibilities (Exhibit B-6).

Mr. Story describes his major job duties as follows (summarized from Exhibit B-2, B-3, and B-6):

50% Computer Labs Management.

> *Hardware configuration and maintenance*. I set up computer hardware and configure the operating system to function in the specific mode that allows multiple users to log in to the workstations and access the software and network resources that are provided for lab use. I also maintain the computer workstations, printers and other attached peripherals for their proper function and interoperation. This means monitoring their operation and responding to trouble reports generated by lab users…
>
> *Software configuration and maintenance*. I install all of the software that is used on the lab work stations and configure it to work with the connected peripherals. I install all of the software packages that are common to all campus labs that are controlled by the central license server… I create a master hard drive image for each computer model that is used in the lab…After each lab workstation is imaged…a configuration session renames the workstation and joins it to the network domain and activities and any other

software utilities that cannot be deployed automatically by the imaging process.

Lab administration. I must promote and negotiate the interests and use of the lab to the campus community. A recent example of this would be when the Patterson lab had to relocate due to the scheduled demolition of Patterson Hall…I had to document and communicate the services of the lab to everyone…in finding and preparing a new location for the lab.

Schedule management. … I must schedule the class activities and special events in the lab. I keep an easily accessible schedule on-line in the Exchange calendar …and post a printed schedule…

Lab staff supervision. For the staffing of the CSBS labs with both lab monitors and assistant technicians, I interview, hire, train and manage two levels of student employment positions – one class for lab monitors and a second higher class that is for technical support for the above listed tasks.

20% Web Content and server administration.

In 2008 a part-time student was hired by CSBS and CAL to design and develop a new design for the two College's web sites. Since that time, and until recently, my role in this area has been concentrated on digital media production for the web site and administering the three…CSBS servers. Server administration includes: joining these servers to the campus network domain…maintain security…patch the server operating systems according to OIT standards…install and maintain services requested by the College…I have returned to managing web content and links on the CSBS and CAL web sites.

20% Digital media, special event support

I cover CSBS and CAL academic events with digital still and video image production, editing and presentation for web optical media distribution. This includes capturing still and video images with still and video cameras and audio equipment and editing them into a finished form using editing software… I have been active in all phases of these projects from pre-production planning, management, production and delivery.

10% Desktop support – network backup.

I troubleshoot hardware, software and network problems for desktop computers, printers and other peripherals used in the CSBS/CAL office suite and to a lesser degree for the faculty and staff of the two colleges. I also provide multimedia support in classrooms and conference rooms of the two colleges and their departments. These duties are in an advisory role and backup to the central campus OIT client services.

> I administer the network backup for the CSBS/CAL office suite and select departmental desktops. I designed a backup plan and configured a network server with attached tape library to back up client computers. This also requires configuring the client computers with the correct network configuration and managing the storage capacity in our server and tape library… I manage the restoration of lost data from the backup media to the designated client device.

In the Supervisor section of the PQ, Mr. Stafford agrees with Mr. Story's description of duties but indicates he believes his position is properly classified as an ITS 2.

Summary of Mr. Story's Perspective

Mr. Story asserts his position reaches the ITS 3 level class by having independent responsibility for performing maintenance, installation and technical support to an assigned area of responsibility which includes four computer labs, and desktop support for two academic colleges with fifteen departments. Mr. Story asserts his work reaches beyond standard-level support through his independent responsibility for providing computer labs management, web content and server administration, and desktop support. Mr. Story asserts he works without back-up; that his assigned area of responsibility is moderate in size impacting single business function or more than one group.

Mr. Story asserts his level of decision-making authority and overall level of responsibility is consistent with the level of responsibility required at the ITS 3 level.

Summary of EWU's Reasoning

EWU asserts the overall level and scope of duties and responsibilities assigned to Mr. Story's position do not reach the ITS 3 level of responsibility. EWU contends Mr. Story's work is best characterized as providing support at the level described in the ITS 2 classification. EWU contends his work involves providing standard maintenance, installation and technical support, and involves following traditional work methods rather than innovative ways to complete tasks. EWU asserts his work is limited in scope and impacts individual users and small groups (i.e. the labs). EWU contends that although Mr. Story provides support to two distinct units, CSBS and CAL, the University's central Office of Information Technology (OIT) also provides hardware, software, and systems support to the units and department staff. EWU asserts his scope of responsibility for maintaining departmental computers is limited as the College's departmental faculty are required to initiate formal service requests to OIT through a centralized University help desk function. EWU contends Mr. Story's position does not have an assigned area that reaches the ITS 3 class level of responsibility.

Comparison of Duties

When comparing the assignment of work and level of responsibility to the available class specifications, the Class Series Concept (if one exists) followed by the Definition and

Distinguishing Characteristics are primary considerations. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the scope and level of work envisioned within the classification.

Comparison of Duties to the Information Technology Specialist series

The Class Series Concept for the Information Technology series states in relevant part:

> "Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.
>
> This category broadly describes positions in one or more information technology disciplines such as: Application Development and Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-Engineering…IT Project Management, Systems Software, Web Development, or Voice Communications."

The majority of Mr. Story's position involves performing professional information technology systems maintenance and support and therefore should be allocated to a class within the Information Technology series.

Comparison of Duties to Information Technology Specialist 2 & 3

The Definition for the Information Technology Specialist 2 class states:

> In support of information systems and users, performs standard consulting, analyzing, programming, maintenance, installation and/or technical support.
>
> Under general supervision, follows established work methods and procedures to complete tasks on computers and/or telecommunication software/hardware, applications, support products, projects, or databases for small scale systems or programs or pieces of larger systems or programs. Performs standard tasks such as consulting with customers to identify and analyze technology needs and problems; responding to and resolving trouble reports from users; processing equipment and service orders; coordinating installations, moves, and changes; analyzing problems for parts of applications and solving problems with some assistance; supporting and enhancing existing applications in compliance with specifications and standards; conducting unit, system or usability testing; writing specifications and developing reports; developing and conducting application, software and/or system operation training for users; or serving as part of a problem solving team addressing more complex issues. The majority of tasks are limited in scope and impact individuals or small groups. Complex problems are referred to a higher level.

At the ITS 2 level incumbents consult, troubleshoot and apply problem solving skills to address standard problems and issues that arise, or they may serve as part of a problem solving team. Standard-level work for this class requires vocational competence. Incumbents are developing a working knowledge of their client's functions

and when addressing standard problems and issues, decision-making authority is limited to following a choice of established work methods. Within established guidelines, incumbents organize, prioritize and implement work activities. Guidance is provided by higher level technical staff for new or unusual situations. Complex problems are referred to a higher level. Work is periodically reviewed to verify compliance with policies, procedures and standards, which limits the ability to work fully independently. In total, the majority of tasks are more limited in complexity and the overall scope of work assignments involves providing support to individual users or small groups.

While a portion of Mr. Story's duties are recurring in nature and fit within the requirements of this classification, this level does not address the overall level of independence he exercises in the performance of his duties, or the scope of impact of his work. His position extends beyond performing standard technical support tasks in support of individual users or small groups to include independent responsibility for maintaining four computer labs within two campus colleges. In total, the duties and the size and area of responsibility assigned to Mr. Story's position reach beyond the level and overall scope of responsibility described by the ITS 2 level class.

The Definition for the Information Technology Specialist 3 class states:

> In support of information systems and users in an assigned area of responsibility, independently performs consulting, designing, programming, installation, maintenance, quality assurance, troubleshooting and/or technical support for applications, hardware and software products, databases, database management systems, support products, network infrastructure equipment, or telecommunications infrastructure, software or hardware.
>
> Uses established work procedures and innovative approaches to complete assignments and coordinate projects such as conducting needs assessments; leading projects; creating installation plans; analyzing and correcting network malfunctions; serving as system administrator; monitoring or enhancing operating environments; or supporting, maintaining and enhancing existing applications.
>
> The majority of assignments and projects are moderate in size and impact an agency division or large workgroup or single business function; or internal or satellite operations, multiple users, or more than one group. Consults with higher-level technical staff to resolve complex problems.

At the ITS 3 level, incumbents work independently performing consulting, installation, maintenance, troubleshooting, and other technical support functions within their assigned area of responsibility. Assignments and projects are moderate in size and require substantive knowledge of policies, standards, and the computing environment in which they work. Incumbents are responsible for completing moderate-sized assignments or projects, identifying and resolving problems that impact a larger scope of operation than the ITS 2 level such as a division, or large workgroup or single business function, multiple users or more than one group. The work methods used and the level of independent decision making required often combine following pre-defined

standards as well as developing innovative approaches to resolve problems or issues that arise. While fully capable of working independently, complex problems are resolved through consulting with higher-level technical staff.

The University's Office of Information Technology (OIT) provides centralized network and other hardware, software, and systems support to the departments and colleges across campus including the CSBS and CAL. While this limits Mr. Story's scope of responsibility for providing sole technical support to colleges, his responsibility for independently maintaining the operations of four computer labs within CSBS and CAL and providing back-up support to OIT for both colleges' departmental faculty and staff reach the ITS 3 level requirements. His position supports information systems and users within an assigned area of responsibility (i.e. four departmental computer labs) encompassing a single business function, multiple users, or more than one group.

Mr. Story is independently responsible for maintaining four departmental computer labs. During the review conference, he clarified that he is the designated single point of contact for providing technical IT support to the maintenance of the labs. His responsibilities encompass a large number of work stations. He participates and serves as the departmental lab representative with regard to developing and maintaining updates to hardware and software relative to centralized lab configuration and other issues University wide.

In addition, the scope of his responsibilities exceeds performing standard-level tasks. This includes planning hardware configuration and software maintenance schedules for the CSBS and CAL labs. Mr. Story installs all software packages that are common to all campus labs that are controlled by the central license server. He independently creates, packages, deploys and configures master hard drive images to the lab's computer workstations which includes personalizing the image out of central labs to meet CSBS and CAL departmental lab needs. He renames and joins the workstations to the network domain and activates software utilities that are not automatically deployed by the imaging process. Mr. Story independently resolves problems or issues pertaining to the software configuration and deployment process. He contacts vendors to address specific installation requirements for installing devices when needed. He makes decisions relative to the installation, configuration and deployment of new network services.

Mr. Story provides sole technical support to the College's three web servers including joining the servers to the campus network domain, maintaining security, patching the server operating system and security logs, installing and maintaining College requested services, and providing Network backup of College servers and client computers on a hard drive array and tape library.

During the timeframe under review, Mr. Story also coordinated and provided technical support to the relocation of one of the computer labs due to the scheduled demolition of Patterson Hall.

Although the Typical Work examples do not form the basis for an allocation, they lend support to the work envisioned within a classification. The following provides an example of

the level of work assigned to the Information Technology Specialist 3 class, as stated on the class specification:

> Follows structured processes to determine requirements. Documents work flow, assists clients in defining and prioritizing requirements, analyzes customers' service and equipment needs, provides information to clients on the capabilities and limitations of available systems;
>
> Independently installs and configures hardware/software;
>
> Serves as system administrator…Identifies moderate operational problems that impact one division or large work group or single business function… Interacts with vendors to resolve straightforward problems;
>
> Uses advanced hardware and software diagnostic tools such as network analyzing equipment and operating system diagnostics to identify and either resolve or refer problems to other staff for analysis;
>
> Monitors and enhances operating environments to ensure optimal performance.
>
> Applies software patches and writes command procedures and programs to eliminate operating errors. Maintains, modifies, installs, tests, and debugs system-level software such as operating systems, device drivers, memory managers, and communications software. Provides maintenance and operations support for applications.
>
> Integrates acquisition needs with business plan for customer's unit;
>
> Consults on desktop productivity tools/software;
>
> Implements security policies and standards;
>
> Develops and implements emergency fixes and resolves hardware system problems;

Mr. Story's responsibilities for managing the daily operations of the four computer labs and providing technical support to the College's web servers are consistent with these statements. In total, Mr. Story's position has an overall scope and level of individual responsibility which reach ITS 3 level work. The primary thrust of Mr. Story's position, and the majority of his duties as a whole, falls within the scope and level of responsibility stated by the Definition for the ITS 3 level class.

In Salsberry v. Washington State Parks and Recreation Commission, PRB Case No. R-ALLO-06-013 (2007), the Personnel Resources Board addressed the concept of *best fit*. The Board referenced Allegri v. Washington State University, PAB Case No. ALLO-96-0026 (1998), in which the Personnel Appeals Board noted that while the appellant's duties and responsibilities did not encompass the full breadth of the duties and

responsibilities described by the classification to which his position was allocated, on a best fit basis, the classification best described the level, scope and diversity of the overall duties and responsibilities of his position.

Based on the level, scope and diversity of the overall duties and responsibilities assigned to Mr. Story's position, his position should be reallocated to the ITS 3 classification.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

> An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board . . . . Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 600 South Franklin, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 753-0139.

If no further action is taken, the Director's determination becomes final.

c: Mark Story
Electra Jubon, WFSE
Lori Kory, EWU
Lisa Skriletz, DOP

Enclosure: List of Exhibits

Mark Story v. Eastern Washington University (ALLO-10-055)

A. Mark Story Exhibits

1. Letter of appeal From Electra Jubon, WFSE, requesting Director's review received by fax to the Department of Personnel on October 4, 2010.
2. EWU Position allocation determination from Lori Kory to Mark Story dated September 15, 2010.
3. 2006 and 2007 Performance Evaluations for Mark Story (10 pages).

B. EWU Exhibits

Cover letter from Lori Kory enclosing documents considered during the allocation review:

1. EWU Position allocation determination September 15, 2010.
2. Position Questionnaire for Mark Story, received by EWU HR on June 2, 2010.
3. Supplemental responses and attachments to the Position Questionnaire, provided by Mark Story, dated June 2, 2010 (31 pages).
4. Lori Kory email to Mark Story dated June 3, 2010, requesting additional information.
5. Email from Mark Story to Lori Kory dated June 7, 2010 providing requested information.
6. Lori Kory's interview notes for Mark Story dated July 7, 2010.
7. Management and Personnel Officer statement completed by Jeffrey Stafford received July 22, 2010.
8. Original Job Description for Mark Story's position.
9. Class specifications considered (incorporated below).
10. Email response from Lori Kory to Kris Brophy regarding Mark Story's performance evaluations submitted exhibit A-3.

C. Class Specifications

1. DOP Class Specification for Information Technology Specialist 2 (479J).
2. DOP Class Specification for Information Technology Specialist 3 (479K).